

Exchange Online Archiving (O365)

What is Exchange Online Archiving?

- Exchange Online Archiving is an additional specialized mailbox that works in tandem with your Primary Exchange Mailbox allowing messages to be quickly and easily archived to simplify mailbox size management. Your Archive mailbox can have messages moved into it manually or automatically via policy, and is also available within OWA (<https://portal.office.com>). The Archive will appear below your other folders.

Why do we have an Exchange Online Archive?

- Free up space in your primary mailbox, increasing Outlook performance and reduce issues associated with e-mail "bloat".
- Access your Archive from anywhere.
- Your Exchange Online Archive Mailbox gives you an additional **50 GB** for which to store e-mail online.

Who can use this service and what e-mail client do I need?

- Users who have had their mailbox moved to Exchange Online O365 and are using a current release of Email client Outlook 2010, 2013, 2016 or OWA (<https://portal.office.com>). Legacy Outlook for Windows, and Linux do not have desktop client support, they will need to use OWA.

State of Illinois Enterprise Email Configuration of Exchange Online Archive.

- The Outlook 2016 client which is part of your Office O365 ProPlus package has an Archive button on the menu ribbon and it has been disabled (greyed out). The Email team has configured Exchange Online Archiving to help keep your Outlook mailbox quota manageable. These initial policies have been set up to work automatically:
 1. Items older than one year will be moved to your Online Archive Mailbox. This will include Calendar, Notes, Drafts and Tasks. This is a change from the Enterprise Vault, where we vaulted items 60 days or older, and left a shortcut for six months.
 2. The Deleted Items folder will keep **30** days of e-mail.
 3. If you previously had a User Archive Vault on the legacy vault system (Veritas Enterprise Vault), it was disabled. If you need to access your legacy Archive vault you will need to do so via the Search Vault link. It would be advisable to bookmark this link as a 'Favorite'.

<http://ilvaultm1.illinois.gov/EnterpriseVault/search>

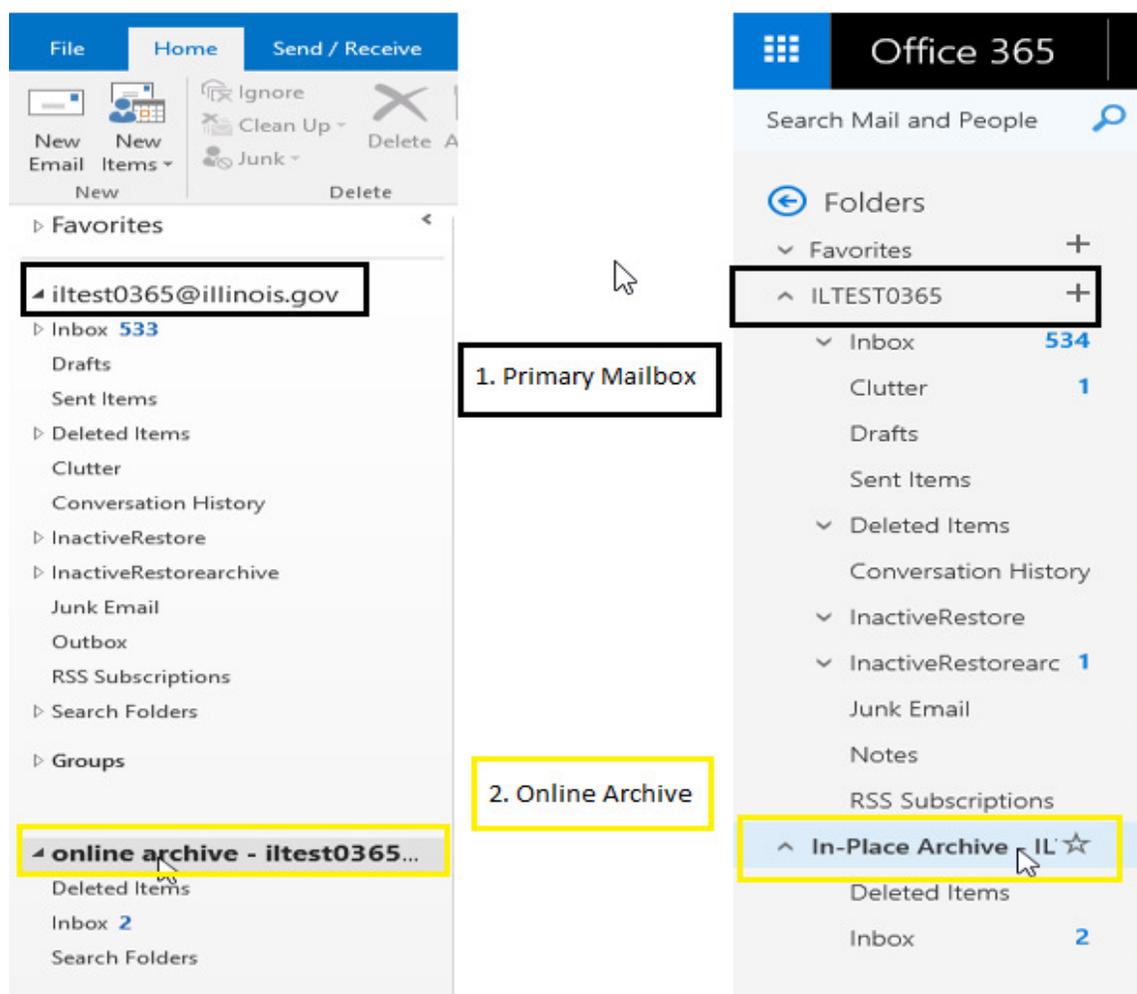
The sections below will guide you through features and usage of an Exchange Online Archive.

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Where is my Exchange Online Archive mailbox located?

If Exchange Online Archiving has been enabled for your mailbox you will see an additional entry under the Exchange mailbox in Outlook (left) and OWA (right) called Archive or Online Archive. If you have access to other email accounts, you will see multiple online archive folders.

1. Your Primary Mailbox in Outlook 2016.
2. Your Archive Mailbox in OWA.



How do Archive Policies work?

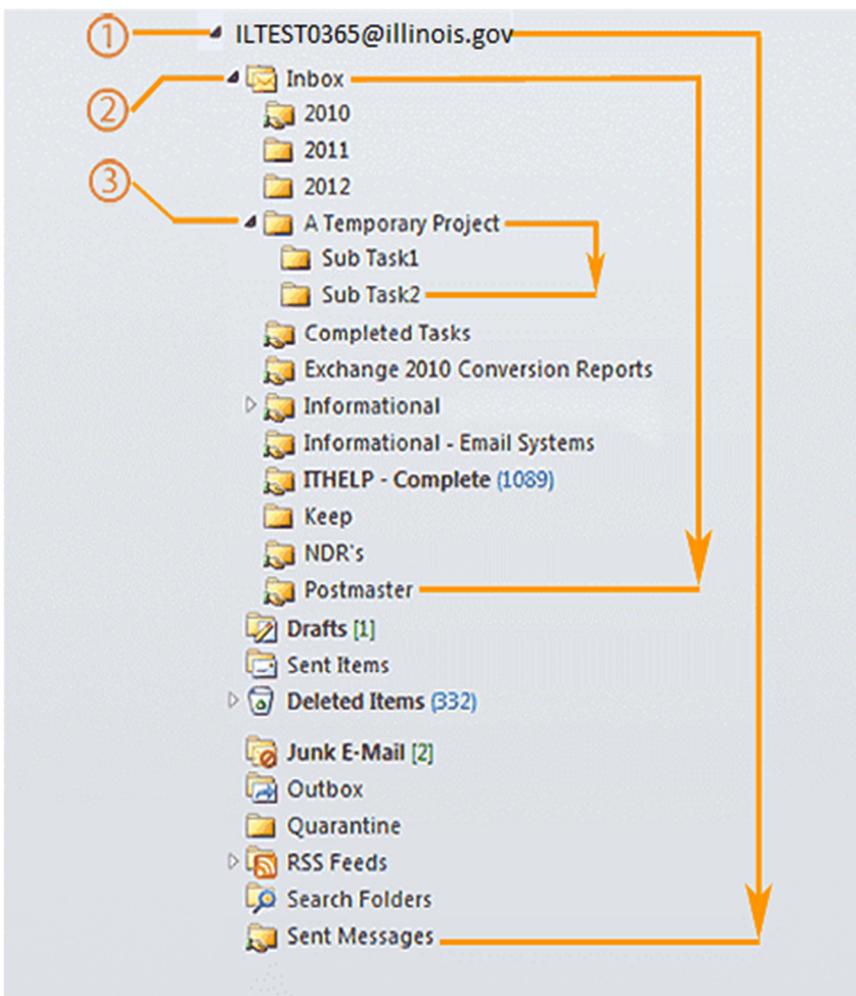
Automatic archiving is accomplished through the use of policies which determine the frequency in which messages are moved to the archive. Archive policies can be set at the mailbox level, folder level or on individual messages. By default, all mailboxes will be assigned a Parent Folder Policy set to archive items when they reach 1 year of age. If you want items moved to the archive sooner, or want to prevent them from being moved to the archive you will need to assign a policy to your mailbox, subfolders, or messages.

When a policy has been applied, the affected messages are moved into the online archive when the managed folder assistant processes the mailbox. This process happens only once every 24 hours, typically overnight. When items are moved to the archive by policy, the mailbox folder structure is preserved (i.e. if a policy is set on a folder, all of the messages that meet the policy criteria will be moved to a folder of the same name within the archive).

When Archive policies are set on a folder (including the root mailbox folder) that policy will affect all items, e-mails and folders it contains. (see example of policy inheritance below for more detail)

Example of Policy inheritance:

1. Root mailbox folder:
Setting a policy here will affect all folders and e-mail in your mailbox.
2. Inbox folder: Setting a policy on the 'Inbox' will affect only the folders and mail contained within the Inbox folder. In effect, a Policy change replaces the inherited policy settings from higher folders. In this case, a policy set at the #1 Root Mailbox folder.
3. Temp Project folder: Setting policy on the 'A Temporary Project' folder will affect itself and the two sub task folders and the e-mail they contain. A Policy change at this folder replaces policy settings made at higher folders. In this case, a policy set at the #2 Inbox folder.



Example 1:

By default all your email will be archived after one year, but some folders may have high e-mail traffic ('A Temporary Project' folders), and you would like them archived sooner. You would set a policy on the 'A Temporary Project' folder to archive after 1 month.

Example 2:

You organize your important past e-mail into years, (2010-2012 folders) and you want items in these folders to remain in your mailbox and never be archived. You can set the archive policy on these individual folders to 'Never'.

Example 3:

When sending large email distributions, you receive NDS's (non-delivery reports) back from invalid address. You file these to the 'NDR's' folder and want them deleted after 30 days. You can set a policy on this folder to delete after 1 month.

Limitations and other need to know items.

There are a few limitations associated with the Exchange Online Archiving feature. These should have a minimal impact on most Exchange users, but are listed here to make everyone aware of what they are.

- The online archive is not available for OWA Light, Evolution for Linux, or Microsoft Exchange ActiveSync. As a result, messages that have been moved to the archive will not be accessible within Outlook 2011, Entourage 2008, Evolution or on mobile devices. Mobile devices can view the online archive if using a browser.
- When Online Archiving is enabled on a mailbox, Outlook's Auto Archiving feature for that profile will no longer function (this applies to Windows Outlook clients only, as Mac clients do not have this option). You can recreate the auto archive functionality using the Archive Policy options.
- When using the Search dialog in Outlook for Windows, you can select the 'All Outlook Items' option to return results from both your mailbox and the online archive

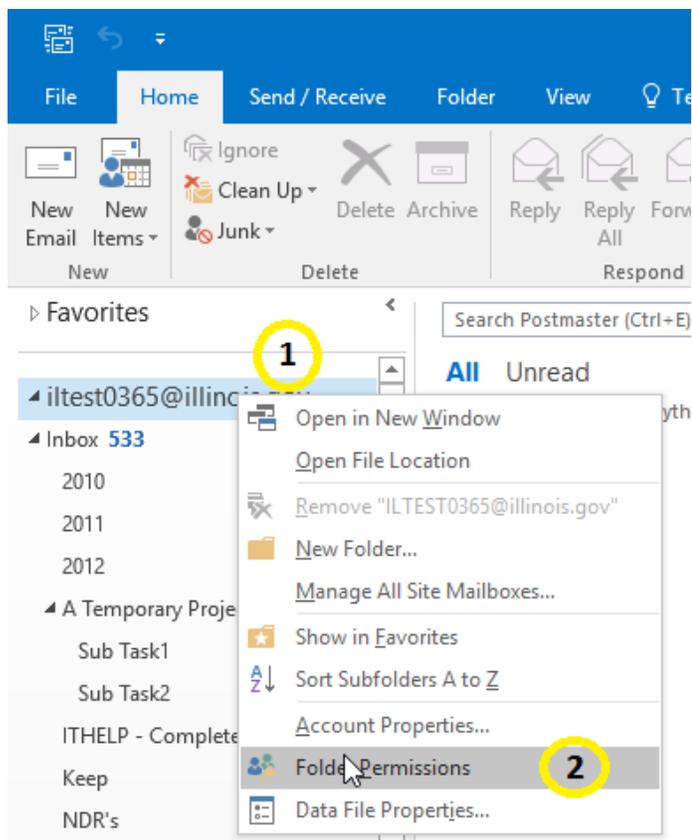
simultaneously. This does not work in OWA so you will need to select the Online Archive before entering search criteria.

- Special folders, e.g. Calendar, Notes, Drafts, and Tasks folders and associated item types will be archived at 1 year by default. You can change the policy for Drafts and Notes but it **must be done via OWA**. Calendar and Tasks folders inherit the policy set on the Root mailbox folder.

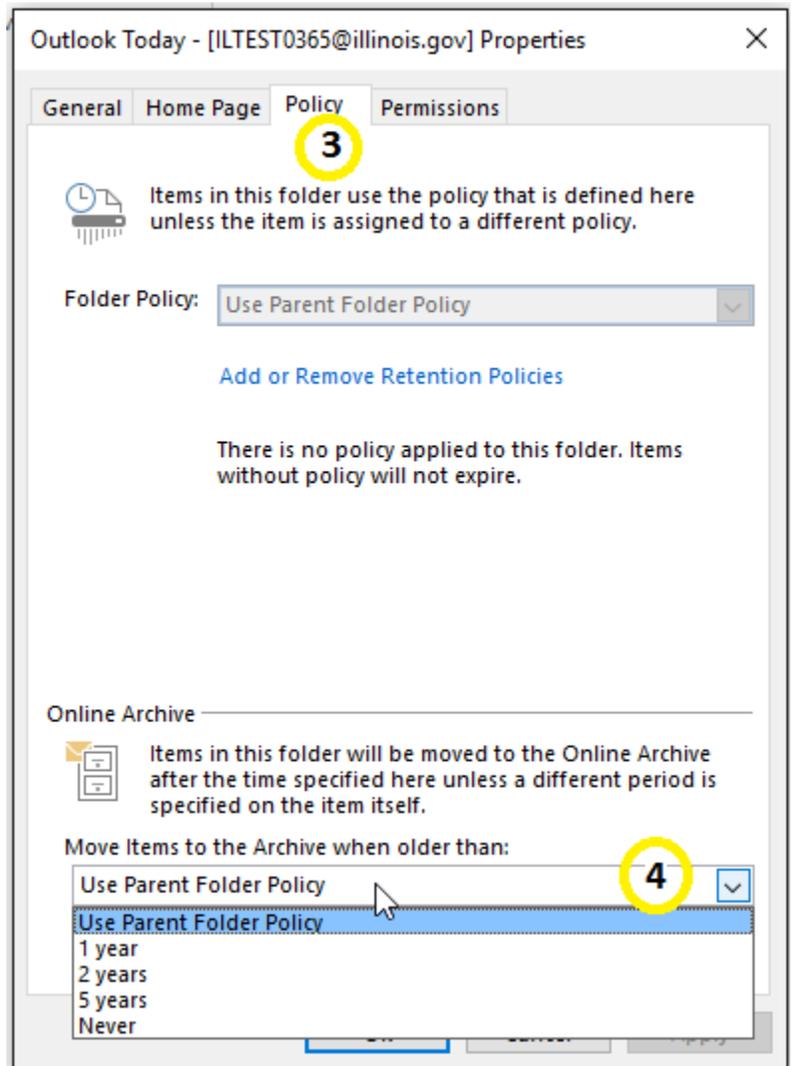
How to assign Archive Policies in Outlook.

How to assign an Archive Policy to a folder in Outlook:

1. Right-Click the folder you wish to change.
2. From the dialog box, Select Folder Permissions.

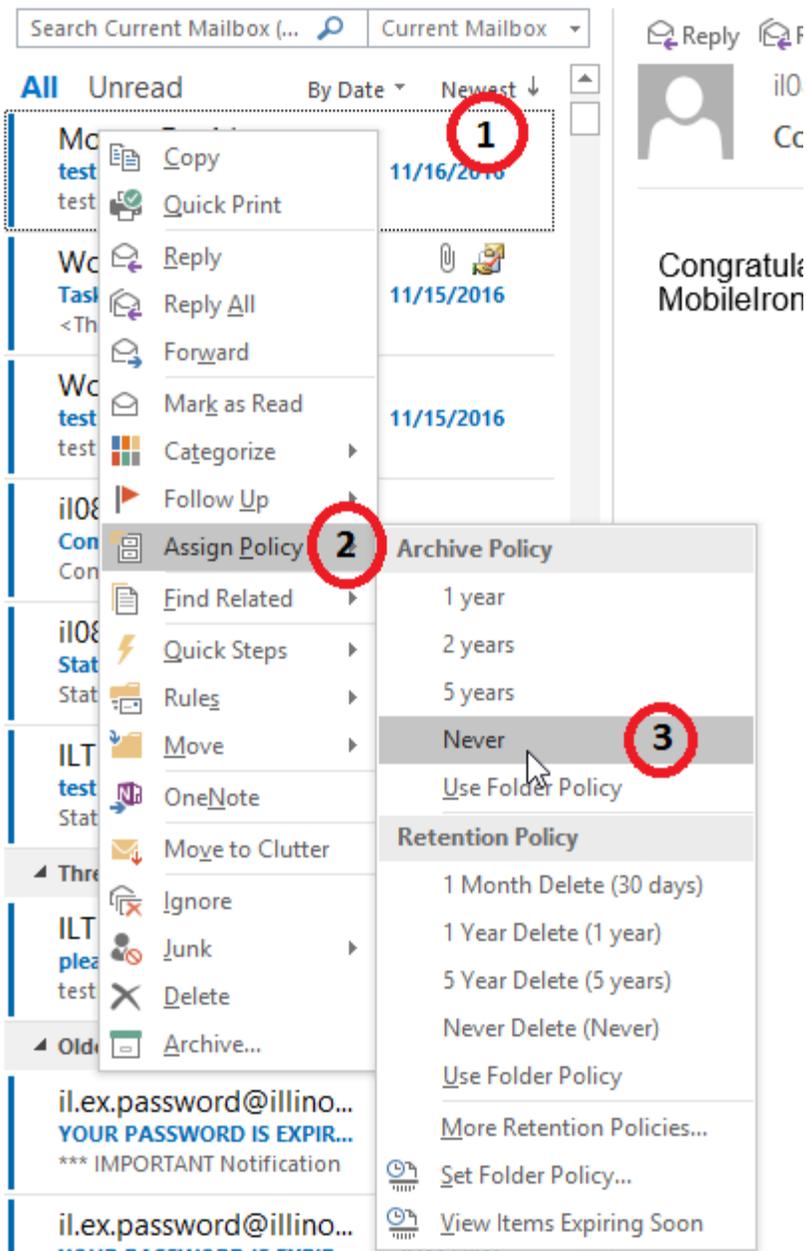


3. At the Top of the dialog box, Select the Policy Tab
4. In the Online Archive section on the bottom, use the drop down box to select the policy you desire



How to assign an Archive Policy to a single Mail item in Outlook:

1. Right-click the desired Mail item.
2. Hover over Assign Policy.
3. Select the desired Policy.



How to assign Archive Policies in OWA.

Important information you should know.

Note: In OWA, archive policies can only be set at the folder and mail item level and not the mailbox level.

How to assign an Archive Policy to a folder in OWA:

1. Right-Click the folder you wish to assign.
2. Hover over Assign Policy.
3. Select the Policy that you desire.

The screenshot displays the Outlook Web App (OWA) interface. On the left, the folder list for mailbox ILTEST0365 is visible, with the 'Inbox' folder (containing 530 items) selected. A right-click context menu is open over the 'Inbox' folder. The 'Assign policy' option is highlighted, and a secondary menu is displayed, showing various archive policies. The 'Personal never move to archive (Never)' policy is selected. Three red circles with numbers 1, 2, and 3 are overlaid on the image to indicate the steps: 1. Right-clicking the 'Inbox' folder, 2. Clicking 'Assign policy' in the context menu, and 3. Clicking the 'Personal never move to archive (Never)' policy in the sub-menu. The main pane shows a list of emails, including a 'Completed: Mobile...' email and several 'YOUR PASSWORD IS EXPIRING' notifications from the Department of Internal Security.

How to assign an Archive Policy to a single Mail item in OWA:

1. Right-Click the e-mail you wish to assign.
2. Hover over Assign Policy.
3. Select the Policy that you desire.

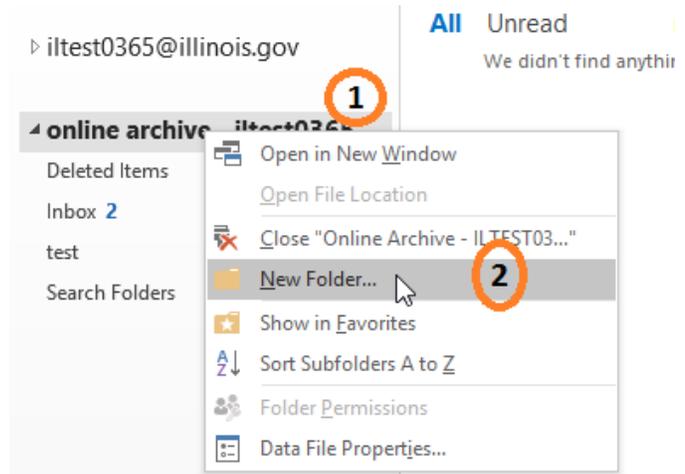
The screenshot displays the OWA interface with the following elements:

- Mailbox List (Left):** Shows folders like 'Inbox' and 'ILTEST2013'. The 'ILTEST2013' folder is selected, showing a list of emails. The top email is 'test read status' from 'State of Illinois - CONFIDENTIAL', dated 11/14/2016. A red circle '1' is around the right-click icon on this email.
- Main Email View (Center):** Shows the details of the 'test read status' email. A red circle '2' is around the 'Assign policy' option in the context menu.
- Context Menu (Right):** A menu is open over the email, listing actions like Reply, Forward, Delete, etc. The 'Assign policy' option is highlighted. A sub-menu is open for 'Assign policy', showing options under 'Archive policy' and 'Retention policy'. A red circle '3' is around the 'Personal 5 year move to archive (5 years)' option.

Manually create a new folder in your Archive.

To create a new folder in your Archive,

1. Right-Click your Online Archive Root folder
2. From the dialog, Select New Folder
3. In the Name box, type the Name of your new folder.



1. Your new folder will be listed under your Archive folder. You can now drag and drop any e-mail that you wish to store.

